Step-by-Step CRM User Onboarding Guide

Welcome! This quick guide will walk you through your CRM onboarding process. Please follow each step carefully to set up your account and start connecting with your customers.

Step 1. Account Setup

1. Check your inbox for a CRM invitation email.
2. Click the registration link and create your password.
3. Log in to your new account with your credentials.

Step 2. Profile Completion

1. Navigate to your account profile page.
2. Fill in your personal details (name, position, contact info).
3. Upload a profile picture (optional).
4. Save your changes.

Step 3. Import or Add Contacts

1. Go to the Contacts section from the main menu.
2. Click â€˜Add Contactâ€™ to create manually, or â€˜Importâ€™ to upload from a CSV file.
3. Check your contact list after importing to verify accuracy.

Step 4. Explore Features

1. Visit the Dashboard to view summaries and activities.
2. Test out different modules such as Deals, Tasks, or Campaigns.
3. Customize your dashboard widgets to suit your workflow.

Step 5. Personalize Settings

1. Adjust your notification preferences.
2. Set your preferred language or region, if applicable.
3. Link your email or calendar accounts for full CRM functionality.

Step 6. Access Support & Resources

1. Review the in-app tutorials or help center.
2. Bookmark the FAQs for quick troubleshooting.
3. Contact support if you have questions or need assistance.

You're now ready to get started! Continue to explore and make the most out of your CRM.